

INTRODUCTORY TRAINING MANUAL

cs | vue[™]

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1 LOCATE CS-VUE

CS-VUE is accessible online, 24/7 from any location at <http://app.csvue.com/>

CS-VUE functions best on Google Chrome or Mozilla Firefox. CS-VUE is supported on Microsoft Edge and Safari.

1.1 LOGIN

Please log into CS-VUE with your email address and password. You defined your password when the Administrator invited you to join CS-VUE.

1 If you forget your password, click on the [Forgot Password](#) link to reset it.

You choose your organisation the first time you log in: subsequent log-ins are always into your last used license.

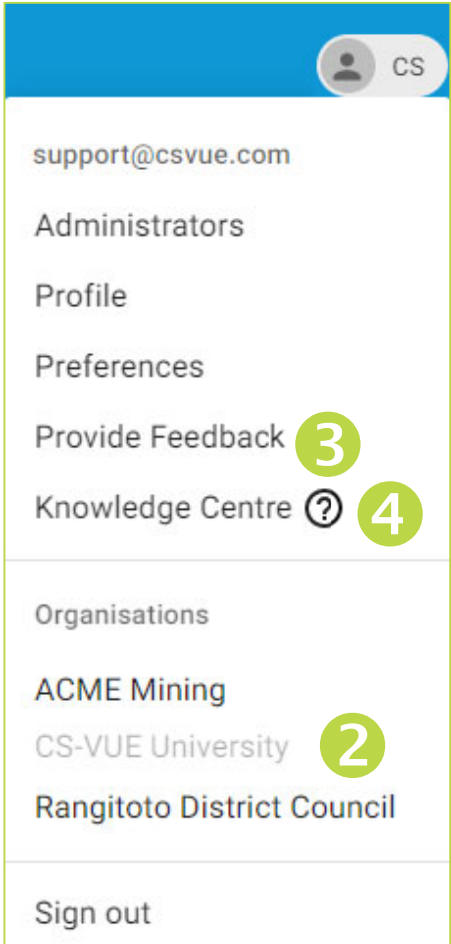
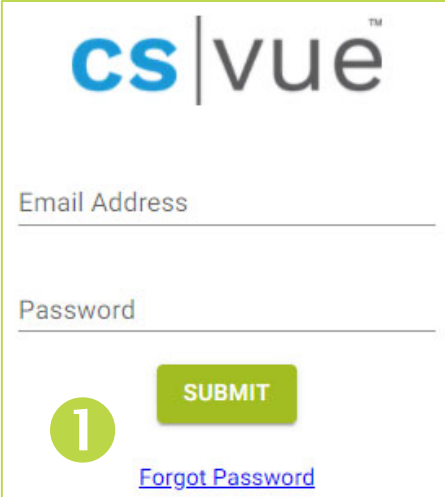
2 You may select a different organisation from your user menu located in the top right-hand side of screen under your initials. Your current organisation is greyed out.

1.2 SUPPORT

CS-VUE uses Sentry software monitoring to automatically provide details of software errors. You don't need to contact CS-VUE support to report bugs, but if you want to let us know what you were doing, please **3** Provide Feedback or email support@csvue.com.

Online help, including videos for users and administrators, is available in the **4** Knowledge Centre listed in your user menu.


Please check with your Administrator if you encounter difficulties with access or editing information: you may not be permitted to undertake some actions.



2 NAVIGATE CS-VUE


The screenshot shows the CS-VUE home page interface. Callout 1 points to the main menu on the left. Callout 2 points to the search bar at the top. Callout 3 points to the view tabs (SUMMARY, FAVOURITES, WATCHING). Callout 4 points to the summary cards and the map. Callout 5 points to the filter icon. Callout 6 points to the filter dropdown menu. Callout 7 points to the user profile icon.

Navigate your home page by clicking on an item to open it:

- 1** Main menu: Collections (p. 14), Documents (p. 16), Companies, People. Only Administrators can view and open Access Profiles (p. 31), Data Feeds [Advanced Insights], Phase Profiles (p. 33), Tag Management (p. 34), Template Library [Advanced Insights], and Organisation Settings (p.36).
- 2** Search field: enter any search text, searching active and draft documents by default, and create a collection or saved search (p. 15).
- 3** Summary view is default view. Click on Favourites or Watching to view selected items. You click on the ★ Favourite and 👁 Watching icons to toggle them off and on (see Iconography, p. 6 for more details).
- 4** Your Summary, Your Compliance, Your Documents: CS-VUE shows an overview based on what you own and what you may sign off respectively. Click on any line in Your Summary, Your Compliance or Your Documents to view details and export. Items with latitude and longitude data are displayed on the map.
- 5** Click  to display Tasks & Activities (p. 5, 20) for your current view.
- 6** Filter on Stakeholder Roles: Default is to show Owner and Signee roles, uncheck Signee box to show only Owned tasks.

7 User menu: Click on your initials to find the Administrators for your license, manage your Profile or Preferences (p. 26), provide feedback, access online help, select your Organisation, or sign out here.

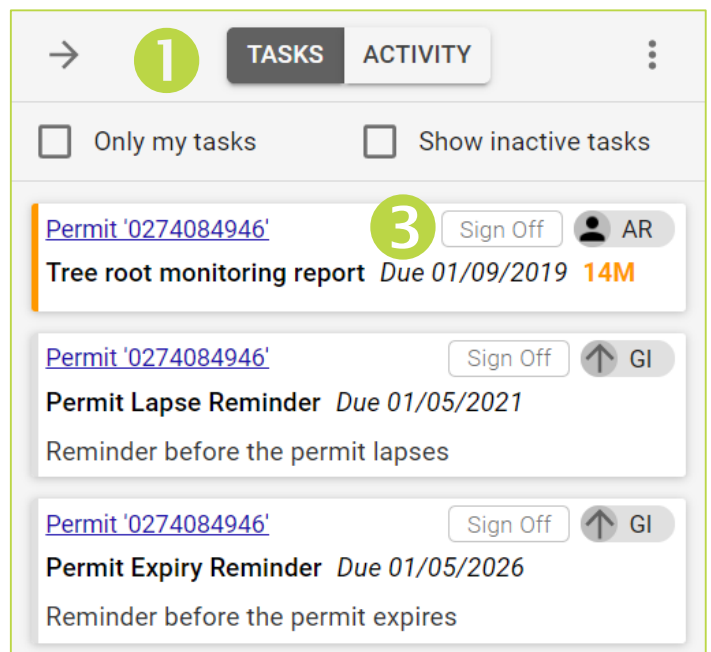
2.1 TASKS/ACTIVITY BAR

Your task bar is contextual and shows only the tasks related to whatever you are currently viewing. Click  in the top right-hand corner to display. The sort order is most overdue to least. Use the task bar to organise your day and sign off tasks which are complete and documented.

1 Toggle between tasks and activities. All edit activity is recorded in CS-VUE.

2 Default display is everyone's active tasks: check the box to show only your tasks and/or inactive tasks i.e. tasks that belong to conditions or permits not yet active

3 Click on the Sign Off button to sign off tasks which are complete and documented.



The screenshot shows the 'TASKS' bar interface. At the top, there is a navigation arrow, a toggle for 'TASKS' (highlighted with a green circle 1) and 'ACTIVITY', and a menu icon. Below this are two checkboxes: 'Only my tasks' and 'Show inactive tasks'. The main area displays a list of tasks for 'Permit '0274084946''. The first task is 'Tree root monitoring report' with a 'Sign Off' button (highlighted with a green circle 3) and user initials 'AR'. The due date is '01/09/2019' with a '14M' indicator. The second task is 'Permit Lapse Reminder' with a 'Sign Off' button and user initials 'GI'. The due date is '01/05/2021'. The third task is 'Permit Expiry Reminder' with a 'Sign Off' button and user initials 'GI'. The due date is '01/05/2026'. Short dates like '10W' and '17M' are used to indicate time passed.



Short dates (**10W**, **17M** et al) summarise how much time has passed.
Y = year, M = month, W= week, D = day

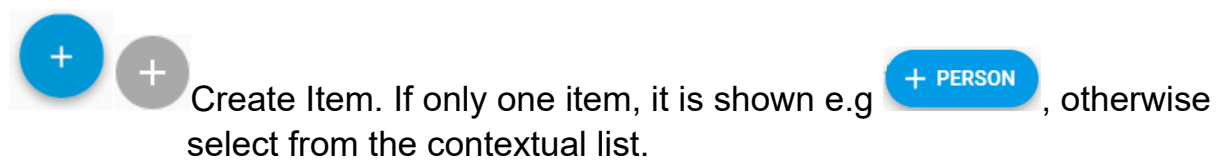
2.2 COLOURS & ICONOGRAPHY

CS-VUE uses colours to alert you to things to be done.



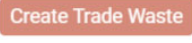



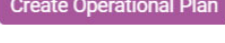






Conditions		Tasks	
	White Nothing to be done		Green Completed task
	Grey = Something to be done		Not yet due
	Orange = NON-COMPLIANT One or more tasks overdue		Overdue task
	Red = BREACH One or more unresolved breach(es)		Breach task

Orange and red colour counts bubble up to their respective documents and collections.

CS-VUE has a consistent, intuitive interface to reduce training time and increase productivity. Items turn light grey and icons show, when you run your mouse cursor over the item area:



Document Types were defined at license implementation. If you require a document type from the list below, please email support@csvue.com.

		<p>Permit: Resource consents issued by councils</p>
		<p>Trade Waste: Trade waste permits issued by councils & organisations (often renewed annually)</p>
		<p>Farm Plan: A plan required by a permit specific to farm activities</p>
		<p>Operational Plan: Any plan not a farm or management plan</p>
		<p>Management Plan: A plan required by a permit</p>
		<p>Document: Any other document not fitting the above criteria</p>
		



Add attachments to the item, or download, preview, upload revisions or delete attachments already there



Delete item (after confirmation)



Edit item text, including tags



Set document order. Drag and drop conditions to change the order.



Watch toggle. You receive an email within 15 minutes of the item changing according to your notification preferences (p. 27). The item shows on the home page under Watching



Favourite toggle. The item shows on the home page under Favourites



View collections that have this item or add/remove item from a collection




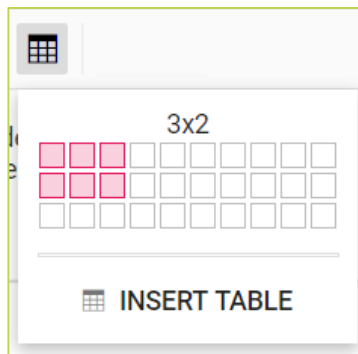
Edit Date fields only. View calendar widget and select date.



Edit Rich Text fields only. Insert hyperlink (any selected text is hyperlinked)



Edit Rich Text fields only. Insert table. You select table dimensions using the grid or create a larger customised table using  INSERT TABLE



Edit Rich Text fields only. Code View. Edit HTML directly.



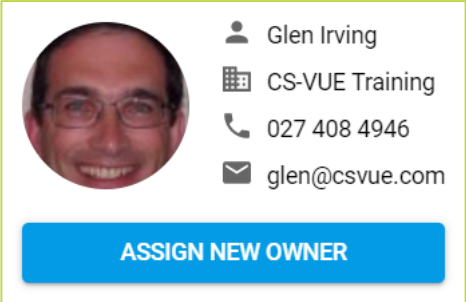
Search results only. Mass update via search (p. 28)




TIP: click on middle mouse button to open multiple tabs (or right click and select “Open in New Tab”). Use Ctrl+F to search on text within the page.

2.3 OWNERSHIP

Ownership is indicated by a chip in the top right-side of the item. Owners can always view, edit, delete and sign off their items. Click on the ownership to assign a new owner, if you have edit permission.



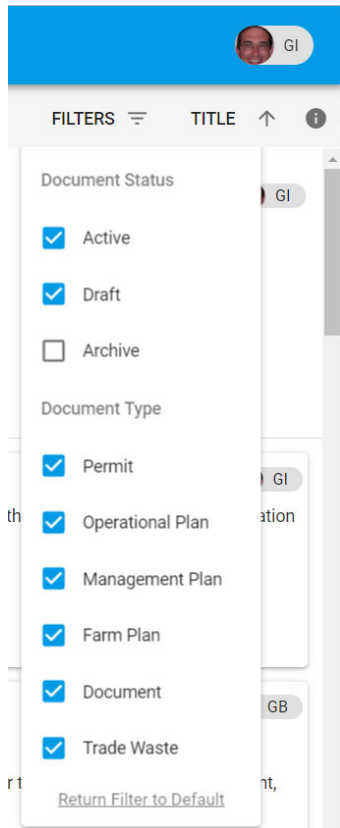
A user profile card for Glen Irving. It features a circular profile picture of a man with glasses. To the right of the picture, the following information is listed: 'Glen Irving', 'CS-VUE Training', '027 408 4946', and 'glen@csvue.com'. At the bottom of the card is a blue button with the text 'ASSIGN NEW OWNER'.

If ownership of an item is omitted on the screen (to save screen space or reduce redundant clutter), the owner is inherited from the document or condition above. You may also see the inheritance icon  GI with the owner's initials.

You, the owner, are notified of events occurring within what you own, according to your notification preferences (p. 27).

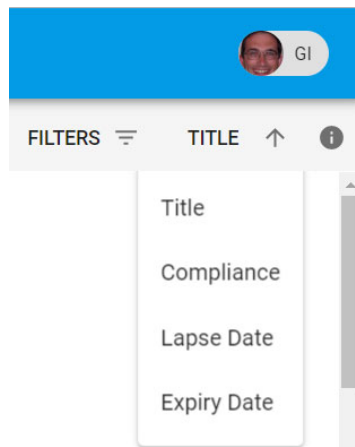
2.4 FILTERS & SORTING

To customise your view, collections and documents have filters and sorting.



A screenshot of a software interface showing a filters menu. The menu is titled 'FILTERS' and has a 'TITLE' sorting option. Under 'Document Status', there are three options: 'Active' (checked), 'Draft' (checked), and 'Archive' (unchecked). Under 'Document Type', there are seven options: 'Permit' (checked), 'Operational Plan' (checked), 'Management Plan' (checked), 'Farm Plan' (checked), 'Document' (checked), and 'Trade Waste' (checked). At the bottom of the menu is a link that says 'Return Filter to Default'.

By default, archive documents are hidden and all document types are visible. Toggle the check boxes to change the filter.



A screenshot of a software interface showing a sorting dropdown menu. The menu is titled 'TITLE' and has a 'TITLE' sorting option. The dropdown menu is open, showing the following options: 'Title', 'Compliance', 'Lapse Date', and 'Expiry Date'.

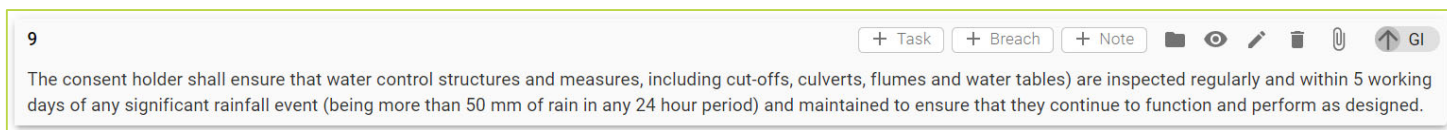
By default, documents within a collection, or conditions within documents, are sorted by Title ascending in numeric 0-9 then alpha A-Z order. Toggle the pyramid arrow to reverse this order.

Compliance sorts on breaches then non-compliance while dates sort on their respective fields. Empty dates have no value and sort last in ascending order.

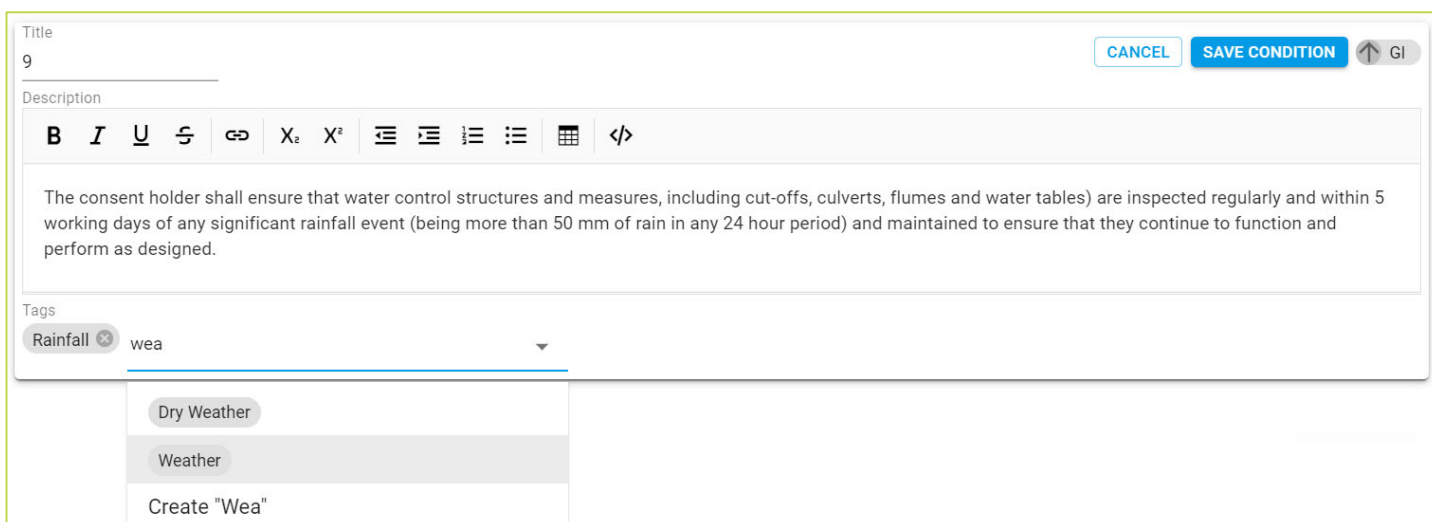
2.5 TAGS


Tags are desirable categories or characteristics you use to identify your collection, documents or conditions, or to store ad-hoc data, such as file references or nicknames. Your Administrator may organise related tags into Tag Groups (see p. 35).

You use tags as filter/grouping parameters for reports (p. 12) and search parameters for a saved search (p. 15). The saved search updates itself with any new items you have assigned the same tag. For example, we want to tag this condition with the tags “Rainfall” and “Weather” to specifically identify the condition as a rainfall event and generally identify the condition as a weather-related event.



Click on the edit pencil  in the top right-hand corner of the condition



Enter the first three (3) letters of your tag and select from the search list if it is already in CS-VUE or create a new entry (if allowed). When you are finished entering tags, click 

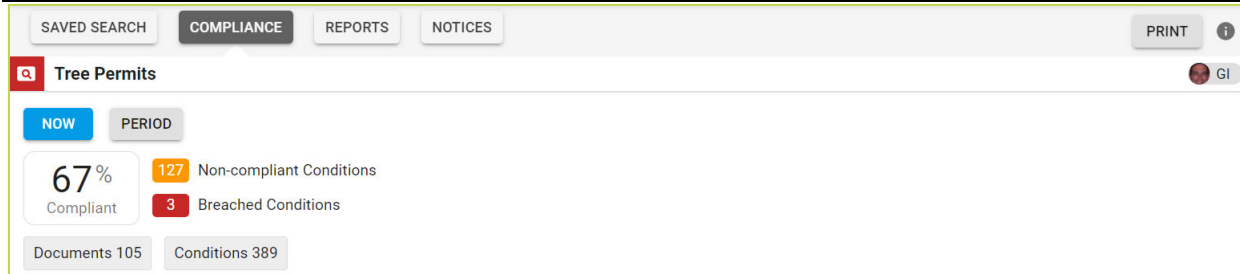


TIP: You can search on plain text parameters to avoid tagging. Tags are useful for explicit categorisation of items. Your Administrator may not allow new tags.

2.6 VIEWS & EXPORT

Some views and export are common to items.

2.6.1 COMPLIANCE VIEW



Click on **COMPLIANCE** view of any collection, saved search or active document to view all non-compliance.

NOW displays current compliance status.

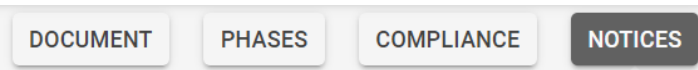
PERIOD displays a specific time period.

PRINT current display. Your browser print button also prints any web page.



TIP: You can create compliance reports for any time period using the Period option, e.g. 1 April 2024 to 31 March 2025, for any month, quarter et al.

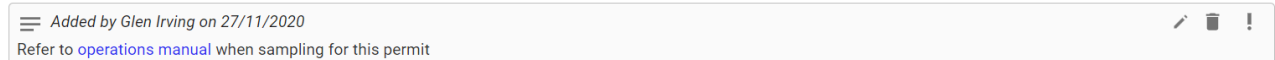
2.6.2 NOTICES VIEW & NOTES



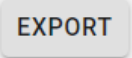
Click on **NOTICES** view to view all notices of a collection, saved search or document.

You can add notes at document and condition level. Use notes to add information independent of attachment or sign off, record process or warnings. You should set important notes as notices: after creating the note, **1** click on the exclamation mark. Notes can be edited, deleted or toggled as notices, but they are not currently searchable.

Document Notes



2.6.3 CSV EXPORT

Use the  button on the far right-hand side of any collection, saved search or document view, to export all data in Comma Separated Value format (also known as comma delimited).

The Entity column of this file is a helper field to describe each record exported. Filter on this column to focus on documents, conditions, document tasks or condition tasks as you desire.

Selected data column	Possible uses
Number of Non Compliance Conditions Number of Breached Conditions	Combined with Entity filter on Document, extract raw counts
Phases Active Phases	Filter for specific phase combinations
[Entity] Task Signed-off Timestamp [Entity] Task Signed-off Date	Compare Condition Timestamp vs Date to determine actual vs recorded sign off dates of conditions



Export uses the current view and filters to generate data – what you see on screen is what is exported.

3 REPORTS

The screenshot shows the 'REPORTS' tab in a software interface. At the top, there are tabs for 'DOCUMENTS' and 'REPORTS' (with a '2' badge), and buttons for 'Show Public Reports', 'PRINT', and 'EXPORT' (with a '6' callout). Below the tabs, there are filters for 'All Activity' and 'Expiry' (with a '1' callout). A search bar contains 'Untitled report' and buttons for 'DISCARD' and 'CREATE REPORT' (with a '5' callout). A 'Filters' section includes dropdowns for 'Document Status' (set to 'Active', with a '2' callout), 'Document Types', 'Grantors', 'Holders', 'Owners', and 'Tags'. Below filters are 'Sort Details By' and 'Group By' options (with a '4' callout). A summary bar shows 'Total', '85% Compliant', '349 Non-Compliant Conditions', '14 Breached Conditions', '342 Documents', and '2414 Conditions'. A 'Detail Level' slider is on the right. At the bottom right, there is a '+ REPORT' button (with a '1' callout).

Reports are integrated into the Documents view, collections and saved searches. You can report globally or on any collection or saved search, and filter on specific parameters. Administrators can also share reports publicly with all users.


- 1 Create a new report or click on a saved report to show it.
- 2 Default filter is document status “active”.
- 3 New report default summary shows compliance overview of entire license (via Documents page) or collection or saved search.
- 4 Default Detail Level is minimum (compliance percentages). Adjust to medium or maximum to display document titles and more details. You can click on a document title to navigate to it, but create your report first.
- 5 You can create a report once the report has a title.
- 6 Print or Export a report. A report exports at medium detail level.

The screenshot shows a 'REPORTS' interface with the following elements:

- 1**: Star icon for saving reports.
- 2**: Globe icon for sharing reports publicly.
- 3**: 'Hilters' dropdown menu for filtering reports.
- 4**: 'Group By' dropdown menu for creating nested reports.
- 5**: A table summarizing report data.

Total	85% Compliant	349 Non-Compliant Conditions	14 Breached Conditions	342 Documents	2414 Conditions
Expired	90.7% Compliant	14 Non-Compliant Conditions	0 Breached Conditions	16 Documents	151 Conditions
Expiring Within 30 Days	100% Compliant	0 Non-Compliant Conditions	0 Breached Conditions	1 Documents	0 Conditions
Expiring Within 90 Days	100% Compliant	-1 Non-Compliant Conditions	1 Breached Conditions	1 Documents	1 Conditions

1 Saved reports for this view are available here. Click on a report to show it.

Click on the  Favourite icon to navigate directly to the report from the Favourites page (p. 4).

2 Administrators only can click on the Globe icon to share the report publicly with all users.

3 Filters for specific reporting requirements. If you don't know what to filter on, then use Group By.

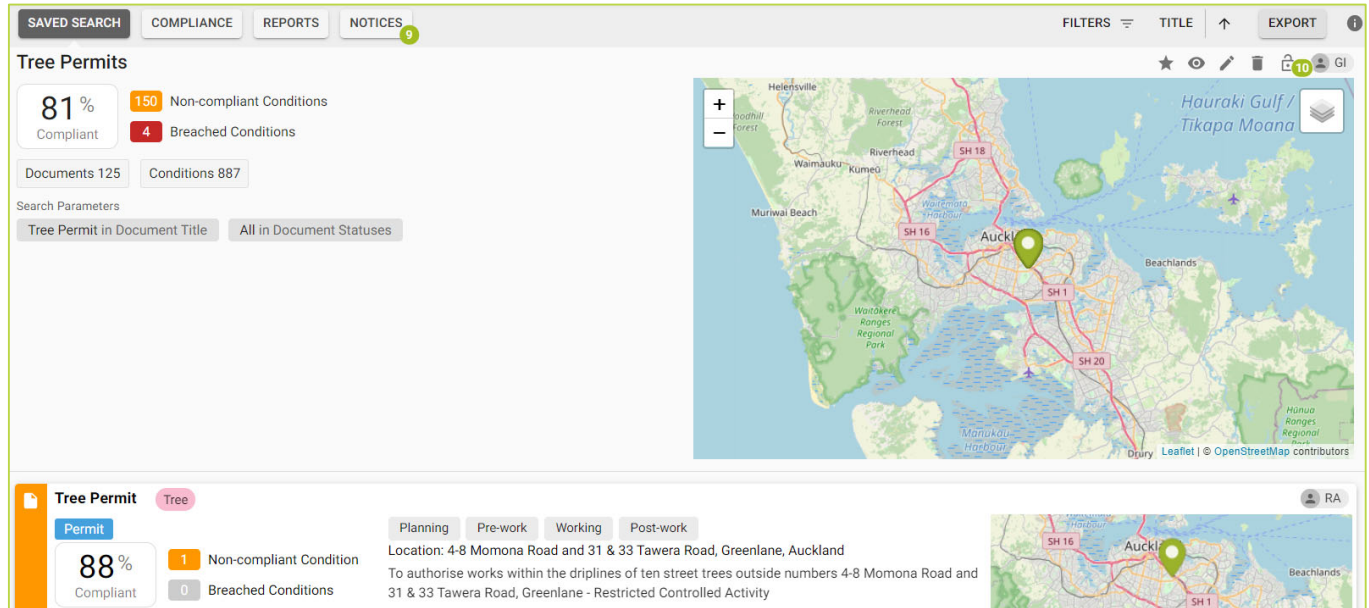
4 You can add multiple Group Bys to create a nested report.

5 Date-based groups are automatically summarised into categories. Documents that do not have the Group By data available are summarised under Other.



TIP: Other category indicates missing grouping data from your documents. You can use medium Detail Level to find these documents and update them.

4 COLLECTIONS



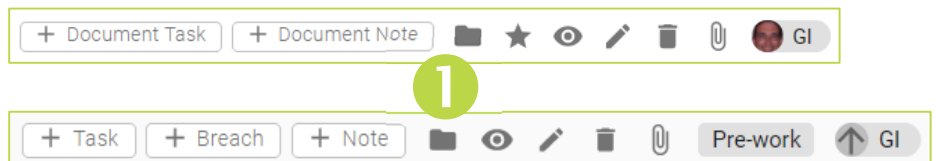
You use collections to organise your documents into coherent groups, report on their compliance (p. 10, 12), view notices (p. 10), and designate access for any number of access profiles (p. 31).

All collections display information bubbled up from their respective items.

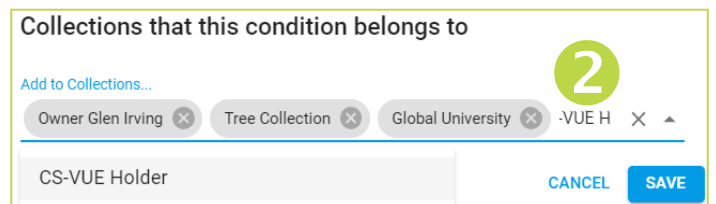
4.1 ADD TO COLLECTION

You can manually add documents and conditions to any collection only. If the permit and/or condition share a common search characteristic, e.g. tag, you should search for this characteristic and create a saved search (p. 15).

1 Click on the folder icon to add a document or condition to a collection.



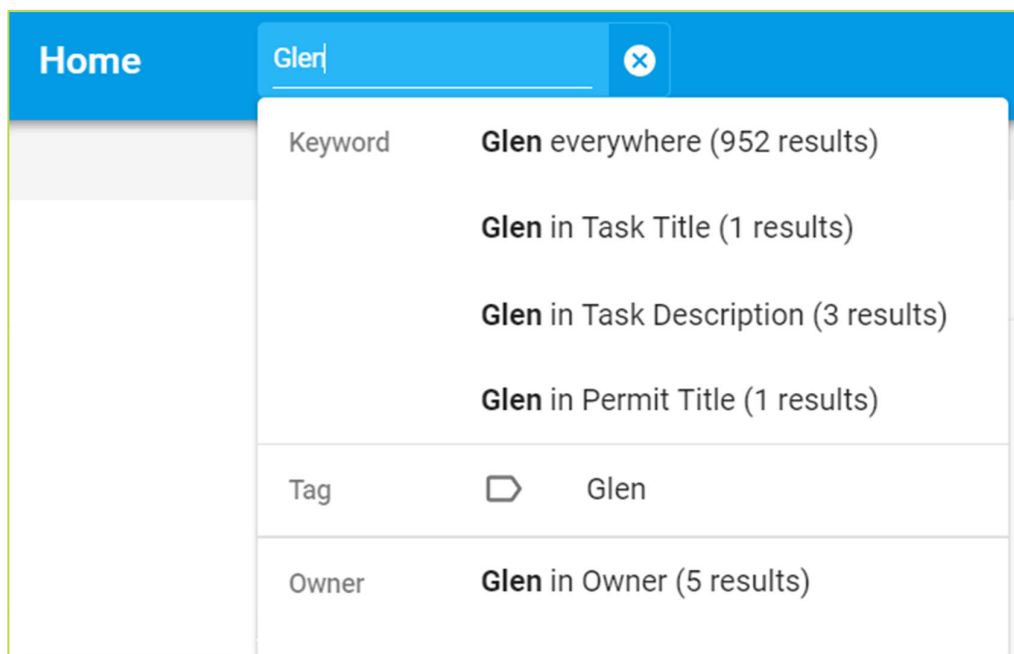
2 Enter three letters to show collection titles in the drop-down and select. You can also remove the item from collections.



Click the **SAVE** button to save your changes.

4.2 SAVED SEARCH & SAVE AS COLLECTION

You can search on text or field parameters. Enter the first three (3) letters of your search phrase and select from the search list or complete your entry.



Click on **SAVE SEARCH** to save this search. Any new item matching the search parameters is automatically added.

The results and permissions of a saved search are limited to what the user can view and access. Only the saved search owner has permission to the saved search itself.

If the user is assigned an access profile (p. 31) with the saved search, all results within the organisation are shown, with permissions as specified by the access profile.

Click on **SAVE AS COLLECTION** to save these search items as a collection. The collection does not change unless items are manually added (p. 14).

Only the collection owner has permission to the collection itself. Ownership automatically grants view access only to the contents of the collection.

If the user is assigned an access profile with the collection, all contents within the collection are shown, with permissions as specified by the access profile.

5 DOCUMENTS

1

0274084946T

Permit

100% Compliant

0 Non-compliant Conditions
0 Breached Conditions

Conditions 7 Tasks 2

Purpose
To authorise works within the driplines of ten street trees outside numbers 4-8 Momona Road and 31 & 33 Tawera Road, Greenlane - Restricted Controlled Activity

Grantor: Aotearoa District Council
Holder: CS-VUE Training

Granted Date: 01/05/2017
Commencement Date: -

Lapse Date: 01/05/2022
Expiry Date: 01/05/2027


Tags: Tree

Phase Profile (Tree Maintenance)
Planning Pre-work Working Post-work

MAP LOCATION TEXT

Map showing the location of the permit area in Greenlane, Auckland, New Zealand. The map includes street names like Market Road, Greenlane, and Green Lane East, and landmarks like Ellerslie Racecourse.



Click  in Document page to create new documents. You can enter any document requiring tracking into CS-VUE. All document types have the same functionality. This manual uses the permit document for simplicity.

***Document Title:** Required. Key reference for the document in CS-VUE: the original permit number issued by the grantor. If there are multiple references, space them together as part of the document title (include no punctuation). Nicknames add as a suffix e.g. 123456 Rangitoto WWTP

***Document Status:** Required. **Permit** Active: the permit counts towards compliance.

Draft **Permit** Draft: the permit does not count towards compliance, because it is not yet ready.

Archived **Permit** Archived means the permit does not count towards compliance, because it is no longer active.

Purpose: Paraphrased or copied from the original permit.

Grantor: The consent authority that issued the permit.

Holder: The organisation that obtained the permit.

Granted Date, Lapse Date, Expiry Date: Supplied by the Grantor and are addressed in terms of the Resource Management Act 1991 (RMA). Lapse Date is the date the permit lapses. The standard statutory timeframe of five years following the Granted Date shall apply unless otherwise stated, as per Section 125 of the RMA. If the Expiry Date is blank, there is no Expiry Date (common for Land Use permits).

Commencement Date: Date permit commences if known and/or relevant to permit. Otherwise blank and granted date used as default.

Plain Text Location (Location Text View): Site address listed in the permit

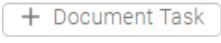
Latitude, Longitude (Location Text View): In decimal degrees

Legal Description of Land (Text View): Usually detailed in the permit, if not, this is blank

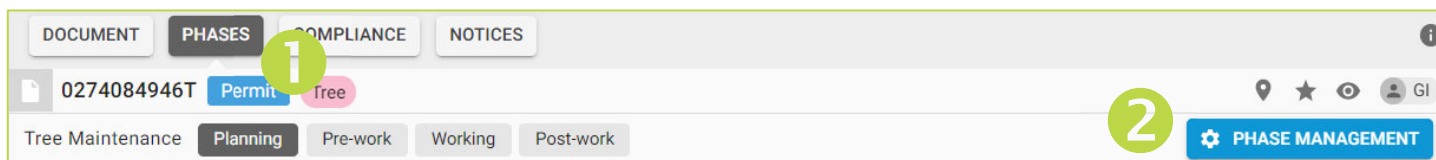
Tags: The permit has the listed tags, which may include activity type, territorial authority, additional file references and any other desirable search information.

5.1 DOCUMENT TASKS

You can add tasks (p. 20) at document level. Document tasks show in the task list, and turn orange when overdue, but they do not count towards compliance.

1 Click on the  button to add new document tasks. The most common document tasks are reminders for Lapse and Expiry Dates of the document.

5.2 PHASES VIEW



1 Click on the **PHASES** button to switch to the Phases View. All conditions are listed in phase order.

2 Click on the **PHASE MANAGEMENT** button to manage phases

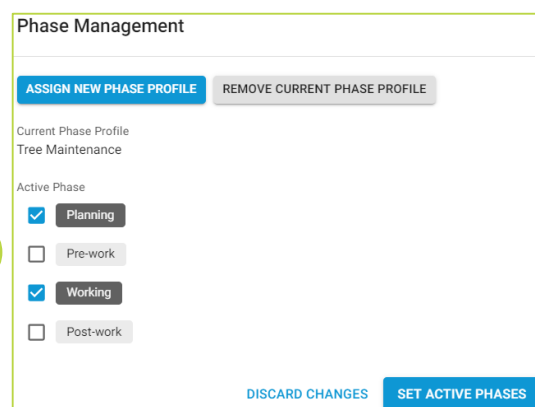
You customise document phasing in phases view. Phases manage time when there are no specific dates. Conditions that belong to an active phase count towards compliance. Conditions that belong to an inactive phase do not count towards compliance, and their tasks do not show on the task panel (p. 5) by default.

Conditions that do not belong to any phase (unphased) always count towards compliance: unphased conditions with overdue tasks are non-compliant.

ASSIGN NEW PHASE PROFILE to replace the current phase profile with a new profile. All current phasing is erased.

REMOVE CURRENT PHASE PROFILE to reset all conditions to unphased

3



3 You can check the active boxes against one or more phases to indicate which phase(s) are active. You may activate phases non-sequentially. Unchecking all boxes means only unphased conditions with tasks count towards compliance. Checking all boxes is the same as having all conditions unphased.

6 CONDITIONS

The screenshot shows a form for creating or editing conditions. It features a title field, a description field with a rich text editor, a phase dropdown menu, and a tags field. The form is annotated with four numbered callouts: 1 points to the title field, 2 points to the description field, 3 points to the phase dropdown and save buttons, and 4 points to the tags field.

Conditions are the requirements you must meet to comply with your document.

- 1 The identifying number or title of the condition, required
- 2 The condition text outlining the condition copied from original permit verbatim, including formatting. Variations to the condition are formatted underline for new text and ~~strike-through for deleted text~~. [CS-VUE uses square brackets to indicate anything added, for clarity's sake, to original text of the condition, and [sic] to indicate that the condition was transcribed as it was found in the original permit, complete with errors]
- 3 You may assign a phase if the document already has a phase profile. An unphased condition always counts towards compliance, regardless of any active or inactive phases. The phase chip on a condition is faded out if the assigned phase is not active, so you can see which conditions are active or not.
- 4 The condition has the listed tags, which may include weather and any other desirable search information (see p. 9 for more details on tags).

7 CONDITION TASKS

1

4 + Condition Task + Breach + Note 📁 👁 ✎ 🗑 📎 ↑ GI
Tree root monitoring results are to be forwarded to ACE team leader monitoring every year for five years starting September 2017.

Condition tasks are the key driver for managing and maintaining condition compliancy. A condition with no tasks implies no work is required on the condition to prove compliance, and the condition is counted as compliant.

Condition tasks allow effective delegation of work to task owners who sign off on the requirements of conditions for compliance, while the number of condition tasks implies the amount of work involved.

1 Click on the + Condition Task button to add a new condition task.

The screenshot shows the 'Create Condition Task' form with the following elements and callouts:

- 2** Task Title: 'Tree root monitoring' (with a dropdown arrow)
- 3** Task Due: Radio buttons for 'Due on Permit activation. Initial due date 21/01/2022', 'Due 13/05/2022' (selected), and 'Repeats every 1 year'.
- 4** Task Description: A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, subscript, superscript, bulleted list, numbered list, table, and code.
- 5** Condition Information: A dropdown menu.
- 6** User profile icon 'GI' in the top right corner.
- 7** 'CREATE CONDITION TASK' button in the bottom right corner.

2 Task title: Required. Title the task as succinctly as possible. *Recommended:* Use a title with no verbs, e.g. “Contractor report”, “Maximum effluent discharge”, “Monitoring results”, “Turbidity measurement”.

3 Task due options (any 1 of 3). Required

Due on activation: Condition is unphased; overdue tasks become non-compliant when permit status is changed from draft to active.

Due on [Phase] Activation: Condition is phased; overdue tasks become non-compliant if in active phase.

Due (default, current date): Task becomes non-compliant if in active phase and date in the past.

Repeats every (default, 1 year): Select number, repeating interval days, weeks, months or years from the drop down list.

The screenshot shows a configuration form for a task. At the top, it says "Repeats every 2 years" with a dropdown arrow. Below this, there are two columns of options. The left column is labeled "Starting" and has two options: "On activation" (selected with a blue radio button) and "On date 13/05/2022" (unselected). The right column is labeled "Ending" and has three options: "On document expiry" (unselected), "On date 13/05/2022" (unselected), and "After 1 occurrence" (selected with a blue radio button). At the bottom right, there is an option "No end date" (unselected).

Starting on activation (default): First instance of task occurs once permit or condition activated, condition becomes non-compliant

Starting on date (defaults to current date): First instance of task occurs on date, condition becomes non-compliant if unphased or in active phase, and date in the past.

Ending on document expiry (default): Task does not repeat past permit expiry date

Ending on date: Task does not repeat past date

Ending after X occurrences: Task repeats only X times

No end date: Task repeats forever



Selecting On activation means you don't need to know an exact date, and you can use the permit active status (p. 16) or condition phase activation (p. 18) to control when your tasks become active

4 Additional information relevant to the task or assists in completion, not otherwise contained in the condition text. *Recommended:* Use action verbs, with additional information not available in condition text. Do not repeat condition text unless required for clarity or decision.


5 Condition title/description is repeated here, click on the down arrow to reveal.

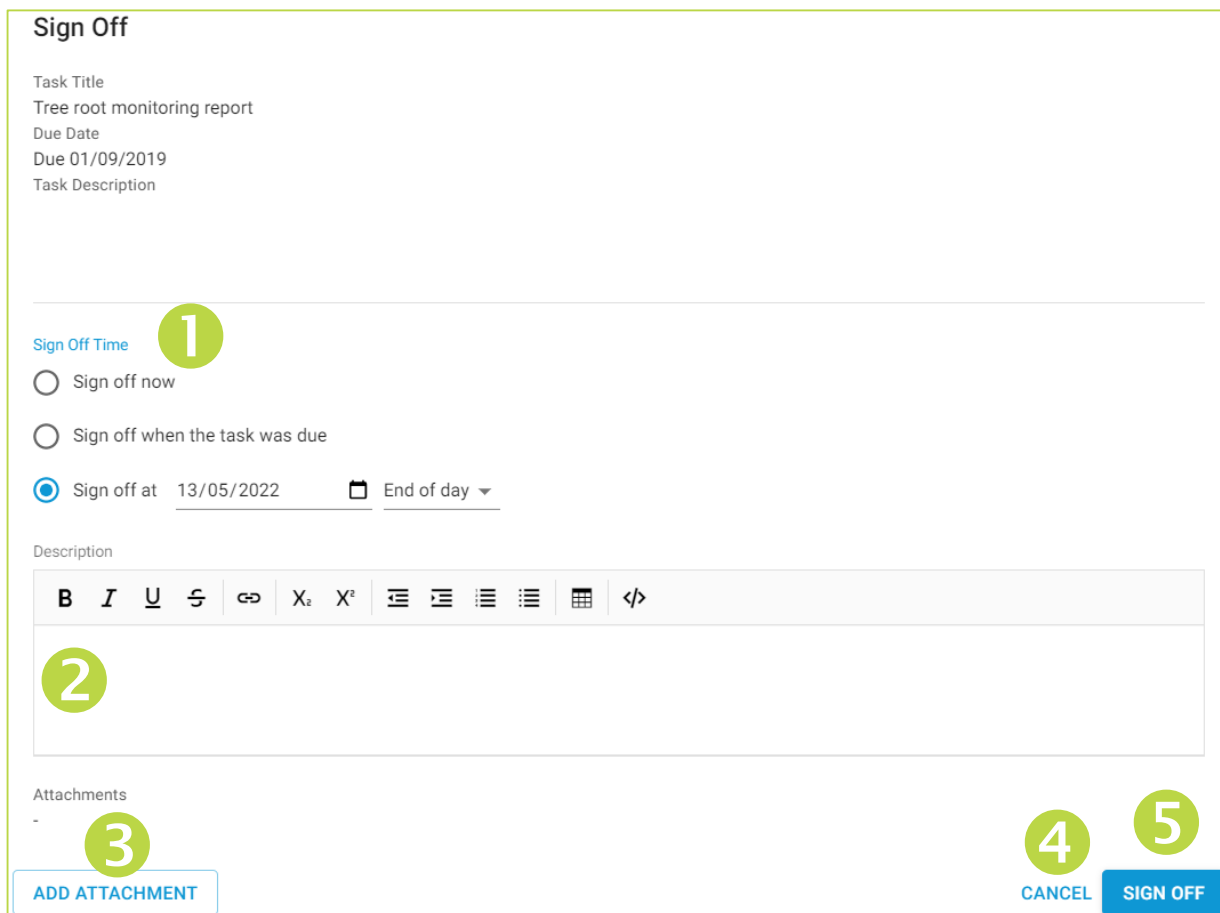
6 Default condition task owner is the permit owner, change ownership top-right corner.

7 Click on  to add the condition task.

8 SIGN OFF

You sign off tasks when completed with documentation to record that the task is done. When all condition tasks are signed off, the condition is compliant.

You may sign off a task if you have sign-off permissions. Click on the  button in the task panel or task menu list.




1 You **must** select the relevant sign-off time.

Sign off now (default): Sign off using today's date. Use this option to skip to the present, ignoring all intervening time periods.

Sign off when the task was due: Sign off with no non-compliance interval between task becoming due and now. Use this option to document in chronological order

Sign off at: Sign off on a specific date. The default is end of day but you may select Custom to specify a time. Use this option to document in chronological order, with intervals of non-compliance.


2 You may describe why you are signing off the task

3 You may  to the sign-off record. It is strongly recommended to provide documentary evidence when signing off a task.



TIP: Portable Document Format (pdf) documents are recommended because they open in preview on most browsers, while other documents (particularly *.doc) must download first

4 Click Cancel if you do not want to sign off this task

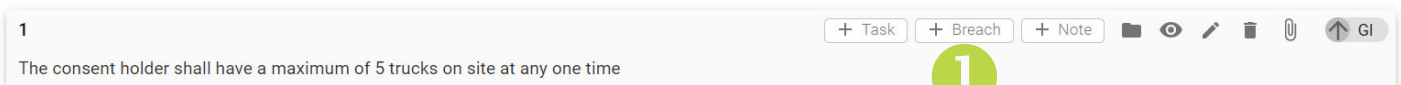
5 Click the  button to complete the sign-off process. **ONCE SIGNED OFF, YOU CANNOT UNDO** (but if you have edit permission, you can add an explanatory condition note or another task)

9 BREACH

You may raise a breach against any condition, because your internal systems show you are in breach of a condition's requirements or you may want to formally record an abatement or infringement notice received from the grantor.

A breach makes a condition non-compliant regardless of completed tasks. To resolve a breach you must sign off all breach tasks i.e. tasks specifically added to the breach.

If a breach has no tasks it is still unresolved. Once a breach's tasks are signed off, the breach is resolved, and the condition returns to its normal compliance state.



1

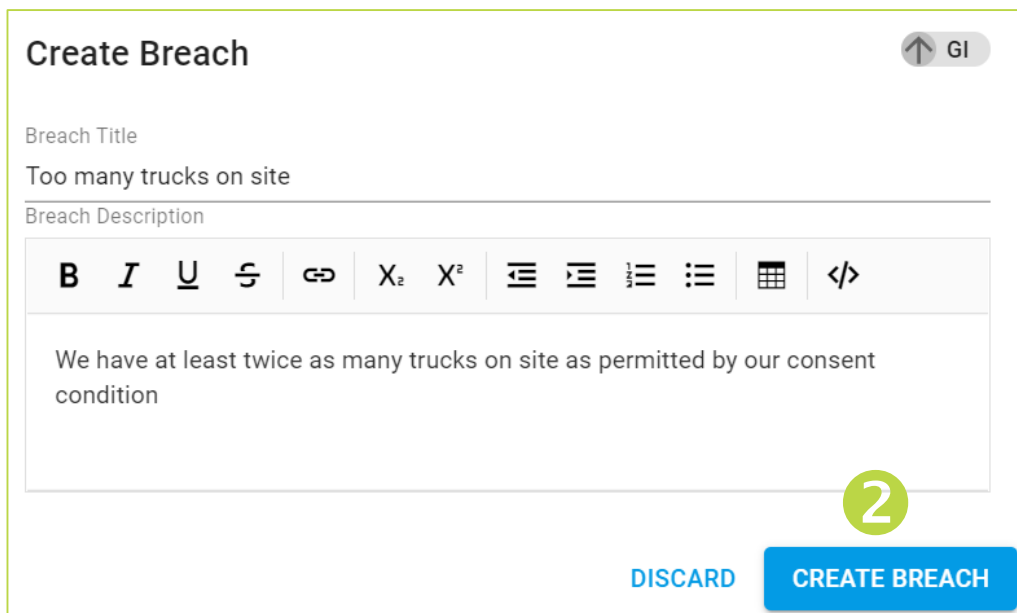
The consent holder shall have a maximum of 5 trucks on site at any one time

+ Task + Breach + Note

1

1 Click on the button to raise a breach.

2 Add a breach title and description, then click



Create Breach

↑ GI

Breach Title

Too many trucks on site

Breach Description

B *I* U ↺ ↻ X₂ X² ☰ ☲ ☱ ☳ ☴ ☵ ☶ ☷ </>

We have at least twice as many trucks on site as permitted by our consent condition

2

DISCARD

1

The consent holder shall have a maximum of 5 trucks on site at any one time

3

Too many trucks on site

We have at least twice as many trucks on site as permitted by our consent condition

+ Breach Task

3 Click on the **+ Breach Task** button to add a breach task.

Create Breach Task

Task Title

Due on Breach creation.

Due

4

Task Description

B *I* U ~~S~~ ↔ X₂ X²

5

DISCARD CREATE BREACH TASK

4 Tasks are due on breach creation or a specific date (default is current date). See p. 20 for more details on tasks. A recurring task is not available for a breach.

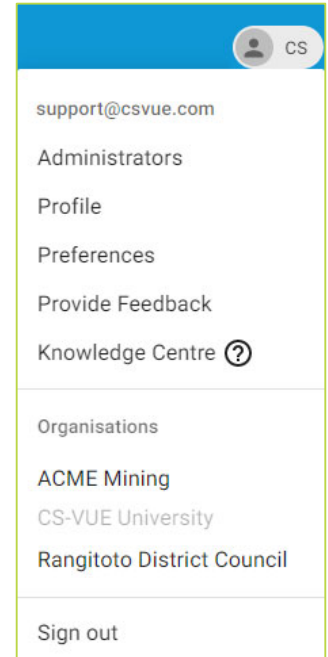
5 Click on **CREATE BREACH TASK** to save the breach task.

You sign off a breach task like a normal task (p. 22).

10 PREFERENCES

Click on your user chip in the top right-hand corner of the screen. Select “Preferences” from the user menu.

Preferences are settings specific to the organisation license you are currently logged into. If you wish to change organisation, select your desired organisation from the user menu.



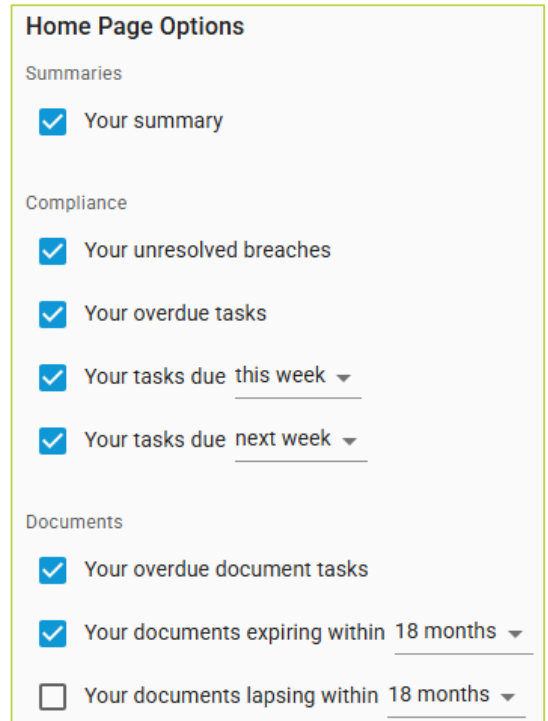
10.1 HOME PAGE

You can choose which components of the home page appear on screen. For example, you may wish to ignore the organisation summary.

Default settings are displayed on the right.

The default task due window is this/next calendar week; you can change to today/tomorrow, fortnightly or monthly.

You can choose the time period for expiring and lapsing documents.



10.2 SUMMARY EMAIL

You can choose to receive a summary email on a regular basis, a particular day of the week, and a particular time period.

The default is Monday weekly between 08:00 – 10:00.

You can choose what content to show from the options to the right, and the time period for expiring and lapsing documents.

Summary Options

Receive summary emails weekly ▾ on a Monday ▾ at 08:00 - 10:00 ▾

Compliance

Your breaches requiring resolution

Your overdue tasks

Your tasks due this summary period

Your tasks due next summary period

Documents

Your overdue document tasks

Your documents expiring within the next 18 months ▾

Your documents lapsing within the next 18 months ▾

10.3 NOTIFICATION EMAIL

Notification Options

Receive notifications

Do not receive emails between 7pm - 7am

Notification Events

Events that occur within Collections, Saved Searches, Documents or Conditions that you have ownership of, or that you are watching ⓘ

New Breaches

New Overdue Breach Tasks

New Overdue Condition Tasks

New Overdue Document Tasks

New Signoffs

Within Collections and Saved Searches that you are watching ⓘ

New Items

You can choose to receive notifications, but not between the hours 19:00 to 07:00. Any notifications generated during this time are held until 07:00.

You can also choose which events interest you, including new breaches, new overdue tasks, new sign-offs, or new items added to watched collections.

You receive notifications where you are the owner of a collection, permit or condition, or you are watching them. *You are not notified of events that you yourself performed.*

11 MASS UPDATE

11.1 REASSIGN OWNERSHIP VIA PEOPLE (ADMINISTRATOR ONLY)

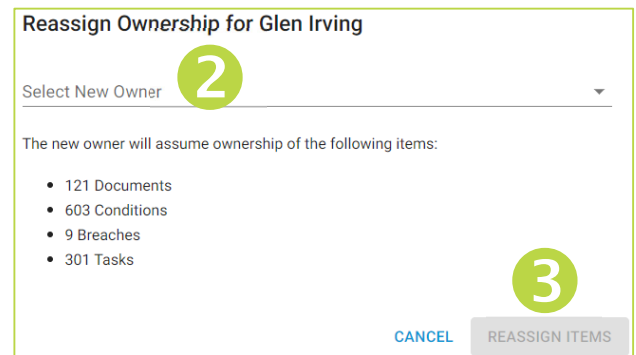
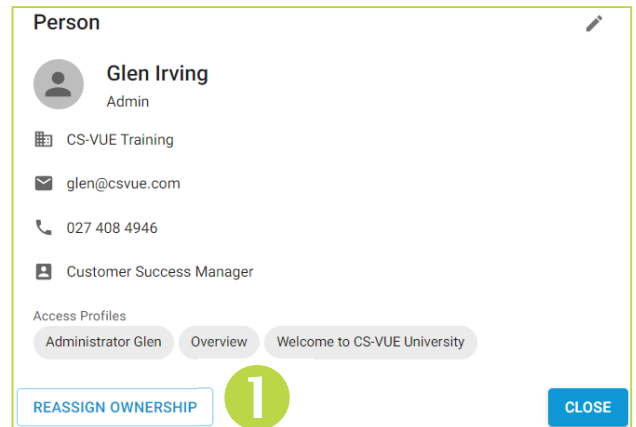
Use this function when one person takes over all the responsibilities of another person.

Click on People in the main menu and click on the person you want.

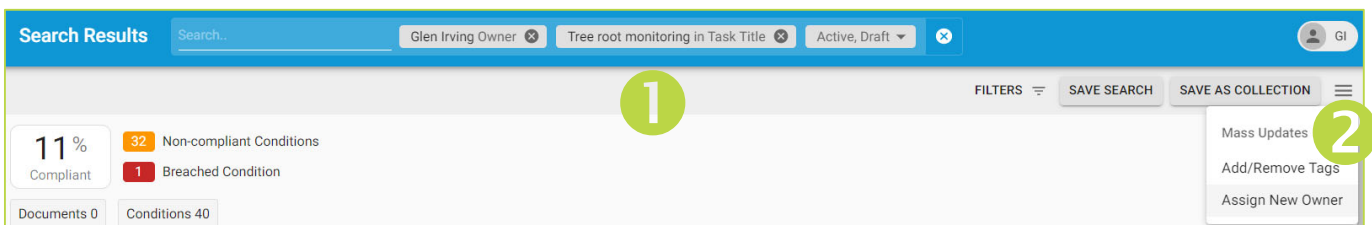
1 Click on the **REASSIGN OWNERSHIP** button.

2 Select the new owner from the drop-down list.

3 Click on the **REASSIGN ITEMS** button to reassign all ownership to the new owner.



11.2 MASS UPDATE VIA SEARCH (OWNERSHIP OR TAGS)



Use this function when you are assigning tasks, conditions and permits (in that order) to different people belonging to items that have the same search parameters (ownership, tags, even text phrase). Use this function to add or remove tags based on a search result.

1 Enter search terms into the Search field until you find the items you want. You usually search for the owner, then some identifying characteristic of the item(s) you want. The above search is looking for Tree root monitoring tasks owned by Glen Irving.

2 Click on the mass update icon  and select Assign New Owner.

3 Select specific items to update ownership; the list may include documents, conditions, tasks and breaches. “Reset all children to new owner” means all tasks/breaches match condition ownership, all conditions match document ownership.

4 Select the new owner from the drop-down list.

5 Click on **ASSIGN** to assign the new owner.



11.3 REASSIGN OWNERSHIP VIA DOCUMENT

You can manually change any ownership if you have edit permission by clicking on the owner chip and changing the owner.

Use this function when you want to change ownership within a single document; for condition ownership, without having to edit every condition.

1 Click on the document owner chip and click on

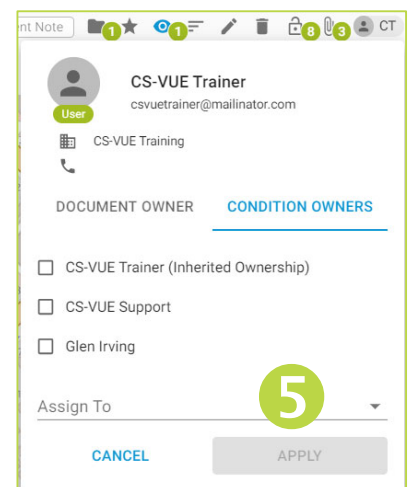
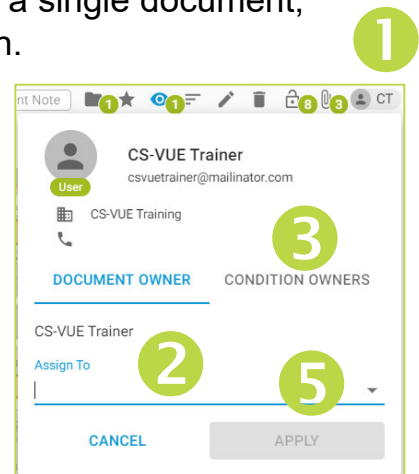


2 Select the new document owner from the drop-down list.

3 Select Condition Owners to specify which condition owners change to 4 the new condition owner. You may make multiple ownership changes in sequence.

5 Click on **APPLY** to assign the new owner.

You cannot directly change task ownership via this method but tasks inherit condition ownership changes if task ownership is not explicitly assigned.




12 CS-VUE ADMINISTRATOR

The CS-VUE Administrator (Admin) has access to all the functionality of CS-VUE for your license that does not otherwise require developer support.

The Admin may assign Administrator access to any other user. It is important to restrict this access to just a few key users within your organisation to maintain data integrity and security.

12.1 CREATING USERS OR ADMINISTRATORS

You may create an unlimited number of users or administrators, either by upgrading current contacts or users, or adding new people.

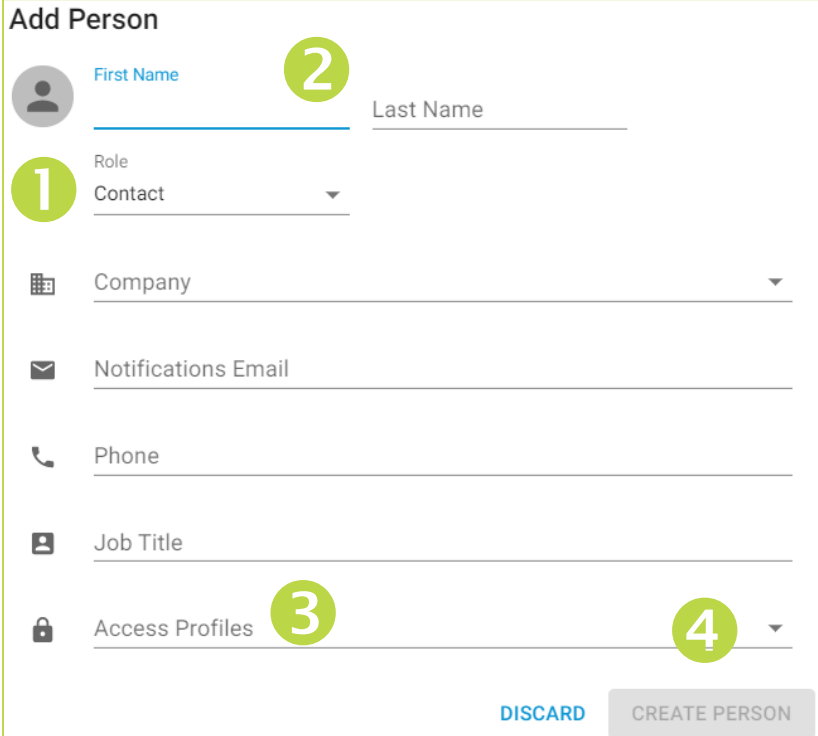
Click on People in the main menu. Click on the  button in the bottom right-hand corner of the screen.

1 Only the Administrator may choose whether a person is contact, user or administrator. All other users enter people as contacts.

2 Add person's details. Only First Name, Last Name and Email are required fields.

3 Add access profiles to an individual user.

4 Click  to save.




The screenshot shows the 'Add Person' form with the following fields and callouts:

- 1**: A dropdown menu for 'Role' with 'Contact' selected.
- 2**: Input fields for 'First Name' and 'Last Name'.
- 3**: A dropdown menu for 'Access Profiles'.
- 4**: A dropdown menu for 'Notifications Email'.

At the bottom right of the form are two buttons: 'DISCARD' and 'CREATE PERSON'.

Any person who becomes a user or administrator for the first time is sent an email inviting them to become a CS-VUE user.

Subsequent visits may display , allowing you to resend the invite if the new user has not received or actioned it. The link expires after 30 days.



Passwords must have a minimum of 10 characters and at least 3 of the following character groups: lower case, upper case, number, or special character (!%\$ etc). This follows guidelines published by OWASP.org (Open Web Application Security Project™).

12.2 ACCESS PROFILES

Access profiles control what users view, edit, and sign off in CS-VUE. You may create an unlimited number of group or individual access profiles.

By default, users may view, edit, and sign off what they own. You do not need to create an access profile if a user is only expected to work with what they own.

Administrators have view, edit and sign-off permission to all documents, conditions and tasks, and by default, only view collections owned, or given explicit access via access profile.

Group Access Profiles grant multiple users, or all users, access to multiple collections or documents. A Group Access Profile may be moved to individual access profiles, but not vice-versa.

Individual Access Profiles (IAP) grant one person access to multiple items. CS-VUE uses IAPs to assign individual access to conditions and tasks. You may use an IAP to grant one person very specific, highly customised access to items.


Item	Admin	User
Documents, Conditions, Tasks	Full unrestricted access	Full access for Owners Access via Access Profiles
Collections	Full access for Owners Access via Access Profiles Full unrestricted access to items within	
Saved Searches*		

* View matches based on your permissions i.e. for Admin all possible matches to search criteria

Click on Access Profiles in the main menu. Click on either the Groups (default) or Individuals tab, then the blue Access Profile button in the bottom right-hand corner of the screen.

The screenshot shows a 'Create Group Access Profile' dialog box. It has several sections: 'Access Profile Title' with the text 'Training' and a green circle '1' next to it; 'Users' with a search bar containing 'Glen Irving' and a green circle '2' next to it; a toggle switch for 'All Users' with a green circle '3' next to it; 'Access Rights' with a table of permissions and a green circle '5' next to it; and a bottom section with an 'ADD ACCESS RIGHTS' button (green circle '4' next to it), a 'DISCARD' button, and a 'CREATE ACCESS PROFILE' button.

Access Rights	Viewer	Signee	Editor
Access All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collection	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 1 Enter the title of the access profile
- 2 Enter the names of people who belong to this access profile. You may enter contacts and later upgrade them to users. You may also add access profiles to an individual user (only) via the People list. Remove a person by clicking on the . You may also remove access profiles from an individual user (only) via the People list
- 3 Switch this toggle to apply the Access Profile to all users within the license.
- 4 Click on the Add Access Rights button to add item types, then type in the first three characters to select the specific item to add to this access profile.
- 5 Check Viewer, Signee or Editor to grant that permission to that item (or all if Access All)

Viewer: read-only access


Signee: sign off access

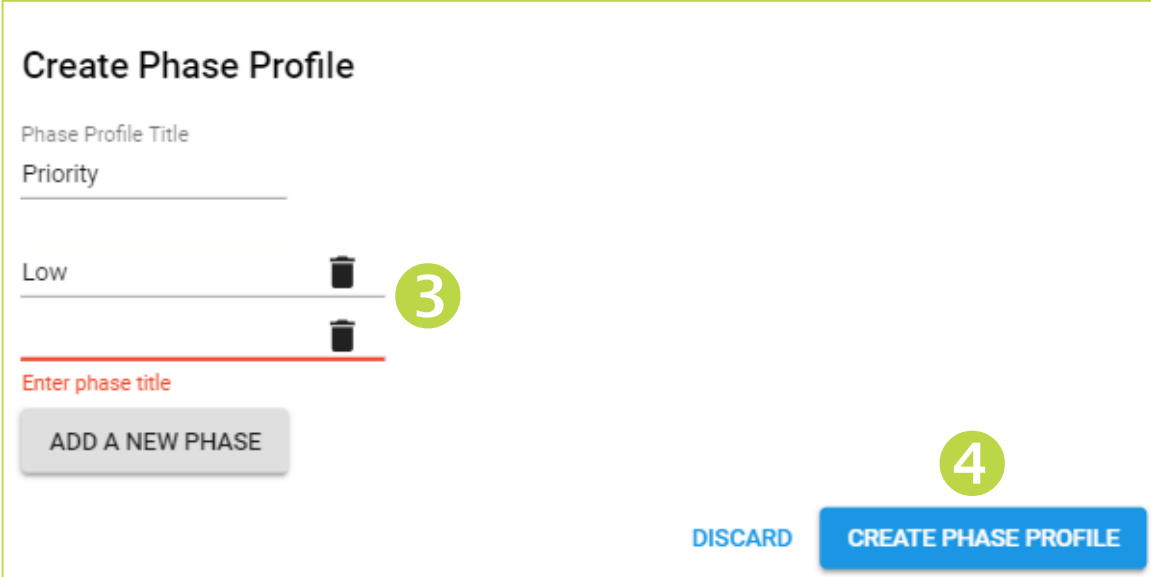
Editor: add, edit, delete

Individual Access Profiles use a similar dialog except the title is the name of the individual and there is no Access All option.

12.3 PHASE PROFILES

Phase profiles control how a permit's conditions become active over time without knowing specific dates. You may create an unlimited number of phase profiles.

Click on Phase Profiles in the main menu. Click on the  button in the bottom right-hand corner of the screen.



1 Phase Profile Title

Priority

Low

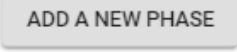
Enter phase title

ADD A NEW PHASE


DISCARD

CREATE PHASE PROFILE

1 Enter a phase profile title

2 Add phase titles in sequential order by clicking . Phase titles are listed in the order they are added.

3 Edit phase titles by editing the text. Delete phases by clicking on the 

4 Click the  button to save, then close if no further editing required.

Any changes in a phase profile is reflected in all documents using that phase profile. A deleted phase or phase profile makes all assigned conditions unphased.

12.4 TAG MANAGEMENT

The screenshot shows the 'Tag Management' interface. At the top, there is a search bar and a user profile icon. Below the search bar is a table with columns for 'Name', 'Status', and 'Usage Count'. The table lists various tags such as 'Archaeological', 'Coastal', 'Comprehensive Stormwater', etc. A settings panel is open on the right, showing options for 'Organisation' and 'Display'. A blue '+' button is located in the bottom right corner of the table area. Five numbered callouts (1-5) highlight specific features: 1 points to the 'Users Can Create New Tags' checkbox, 2 points to the 'Show Archived Tags' checkbox, 3 points to the '+' button, 4 points to the 'Usage Count' column, and 5 points to the 'Divert Stormwater' tag.

Name	Status	Usage Count
Activity		
Archaeological	Active	7
Coastal	Active	3
Comprehensive Stormwater	Active	0
Designation	Active	2
Discharge To Air	Active	5
Discharge To Land	Active	15
Discharge To Water	Active	24
Divert Coastal Water	Active	1
Divert Stormwater	Active	1
Divert Surface Water	Active	1
Earthworks	Active	5
Farming	Active	2
Groundwater Take	Active	1
Quarry	Active	3
Stormwater	Active	20
Structure	Active	9


SETTINGS

- Organisation
 - Users Can Create New Tags
- Display
 - Show Archived Tags
 - Collapse Tag Groups

1 Default license setting: users can create new tags

2 Default display shows only active tags. Archived tags remain in use but cannot be added to items from the time of archiving.

Collapse Tag Groups to make it easier to move tag groups around, and see all tags

3 Click on the  button in the bottom right-hand corner of the screen to add new Tag Groups or new tags.

4 Counts of tag usage.

5 Sort and render order of Tag Management list. Drag and drop tags, tags within tag groups, and tag groups to determine the order shown on items.

Click on tag groups or tags directly to edit further options.

12.4.1 TAG GROUPS

Tag groups organise and sort tags while implementing your organisation's business rules by requiring **2** one optional tag [Enterprise], exactly or a minimum number of tags on **1** specified document types [Advanced Insights].

Tag Group

Name

Activity Type

Applicable Documents **1**
Permit, Document, Trade Waste

Required Number of Tags **2**
Minimum 2

Colour
Candy Pink

Tags

- Archaeological
- Coastal
- Discharge To Air
- Discharge To Land
- Discharge To Water
- Divert Coastal Water
- Divert Surface Water
- Earthworks **3**

Add Tag... **4**

DISCARD CHANGES SAVE TAG GROUP

3 Add tags using the drop-down list which filters on the text you enter. You can also enter new tags here.

4 Click the **SAVE TAG GROUP** button to save, then close if no further editing required.

12.4.2 TAGS

You can create, merge, edit, archive, and delete tags.

Tag

MERGE TAG **2**

Tag Name **1**
CS-VUE catch-up

CLOSE

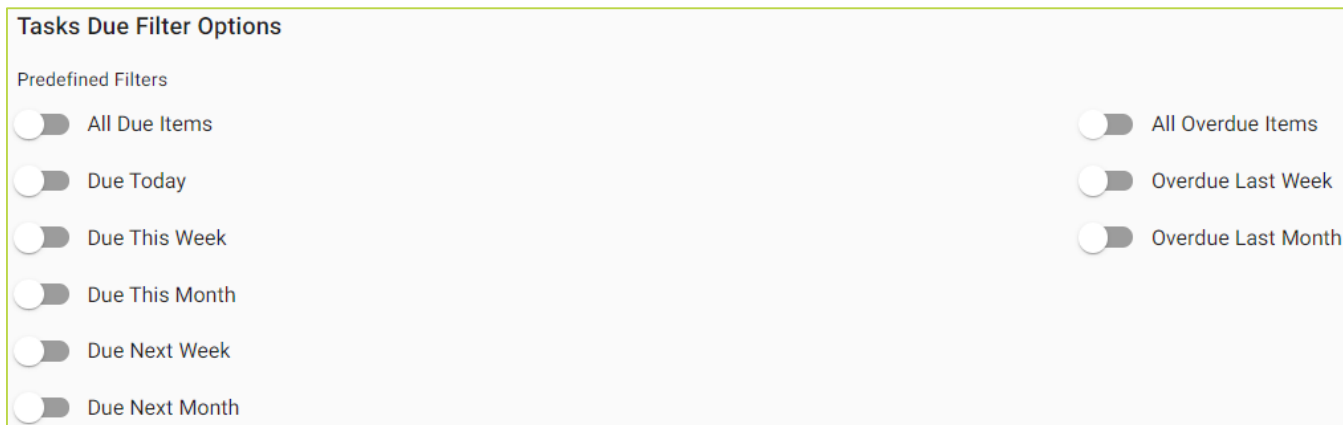
1 Archived tags cannot be added to items from the time of archiving, you can still search or delete them on items.

2 Select the tag you want to merge with. You may choose to retain your original tag for use (with a zero count), the default: original tag is deleted after merging (e.g. spelling mistake).


12.5 ORGANISATIONAL SETTINGS

Global settings you may choose for your organisation.

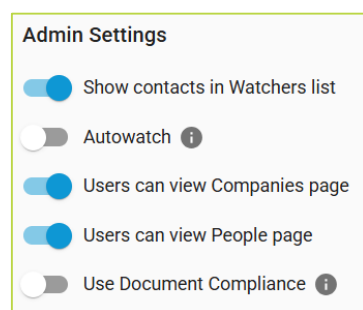
12.5.1 FILTERS



All task filters are off by default. You can choose which common task filters are available under the Filters menu in Documents view or any collection or saved

search. Click on the  button in the bottom right-hand corner of the screen to add new filters.

12.5.2 ADMIN SETTINGS



Contacts are excluded from the Watchers list by default, you can choose to show contacts.

Users are not automatically added as a Watcher when assigned an item, you can choose otherwise. Make this selection before you change any Access Profiles, but remember most users don't appreciate watching everything they may access. To remove a user as a

Watcher, set Autowatch to on, then remove the user from any relevant Access Profile(s). Switch Autowatch off once complete.

Users can view Companies and People page by default, you can choose to hide these pages.

Default compliance is calculated on conditions count, you can choose to calculate based on document count (Hard Mode CS-VUE), affecting the Summary Page, Documents Page, Search Results Page and Collection only. Reporting and the Compliance tabs in Documents and Collections remain calculated from condition count.